

The Power of PowerLink

Part 1

Reviewing the Features and Functions of PowerLink

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Overview of the Power of PowerLink Part 1

- Security Settings
- Main PowerLink cards
- PowerLink Preferences
- Lists
 - Tool bars
 - Views
 - Subsets
 - Sorts
 - Setting Favorites
- Templates
- Object Preferences
- Shortcut (Control) Keys

Security

Security options in PowerLink

Item Warehouse Card

Name (temporary)

Card properties

Domain Public

Security (none)

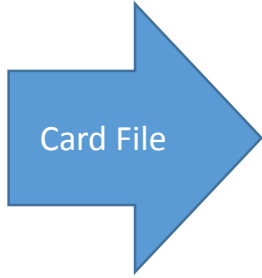
- All views, subsets, sorts, cards, card files, templates have 3 security options
 - PUBLIC
 - Available to anyone in the company
 - PRIVATE
 - Only available to the person who created the option
 - PUBLIC BUT SECURE
 - The option (view, card, etc.) is flagged as 'Public' but a security group is added in the 'Security' field
 - IT will need to create the group and add users to it.
 - Only people in the group will be able to see/use the option

Main Card File

Understanding the options available for the main card file

General information

- When you double click to open PowerLink and log in, the main card file and active card displayed is determined by your System Preference settings
 - HINT: Create different card files for different departments
- The icons on the cards are referred to as 'Objects'
 - These can be XA files, Workbenches or Workspaces
- IT can use Enterprise Integrator to create new objects over both XA files and non-XA files (access data files, user created files, etc.)



infor (IP) Infor XA Power-Link

File Customize Navigation Help

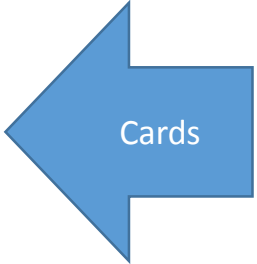
CISTECH DEFAULT

| | | | | | | | |
|--------------------|---------------------|-------------------------------|-----------------|----------------|----------------------|-------------------------------|------------------------|
| Warehouses | Warehouse Locations | Items | Item Warehouses | Item Locations | Discrete Allocations | Inventory Transaction History | Inventory Count Groups |
| Inventory Statuses | Transaction Reasons | Transaction Code Descriptions | | | | | |

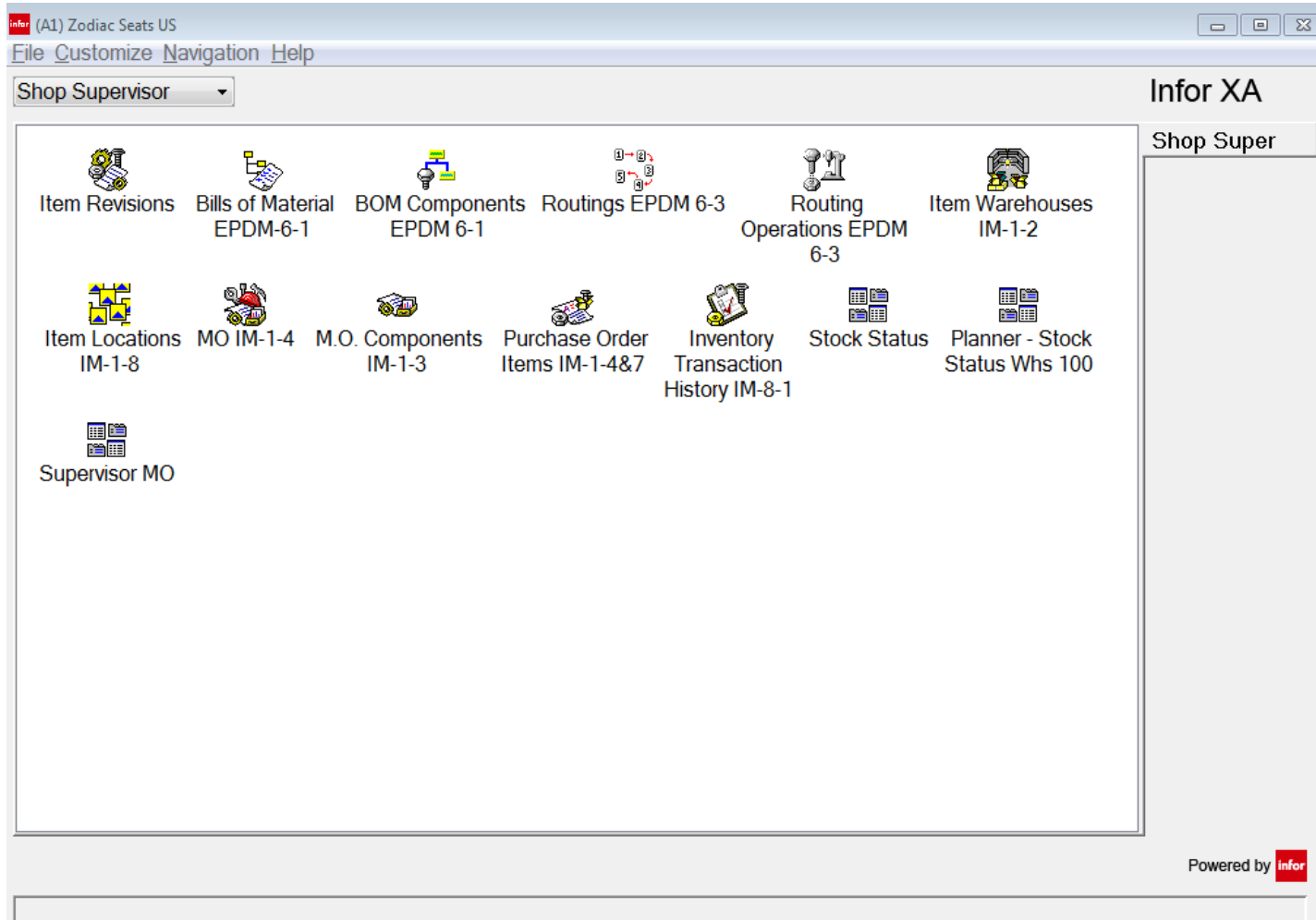
AM Plus
Customer Service
Engineering
Materials
Production
Finance
Procurement
Environment
Integrator
RF Physical Inventory
RF Pick/Pack/Ship
Product Structure Display

Inventory Shipping Receiving

Powered by infor

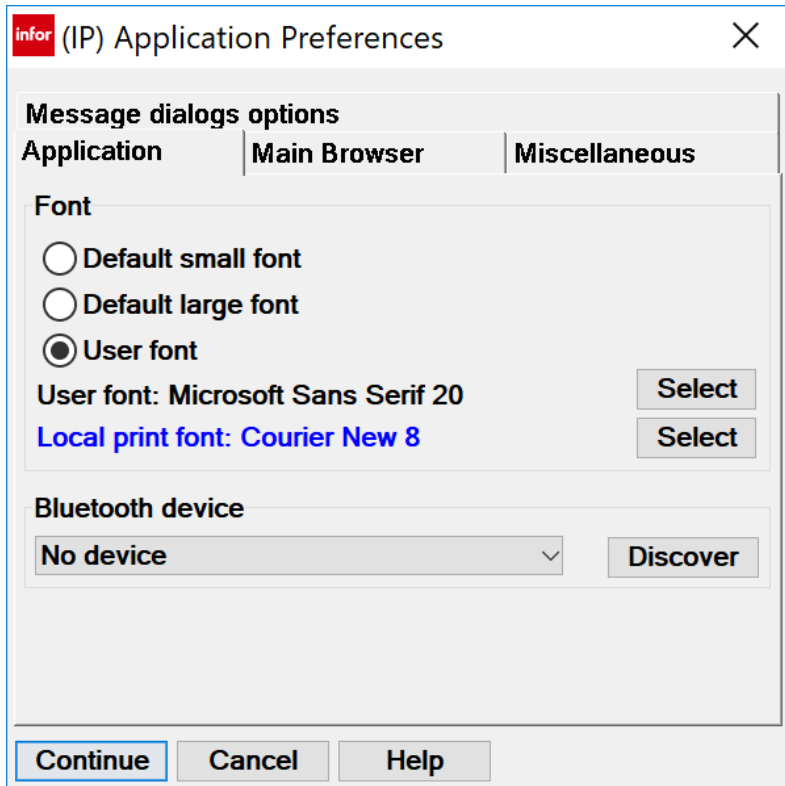


Alternate Card File for PowerLink



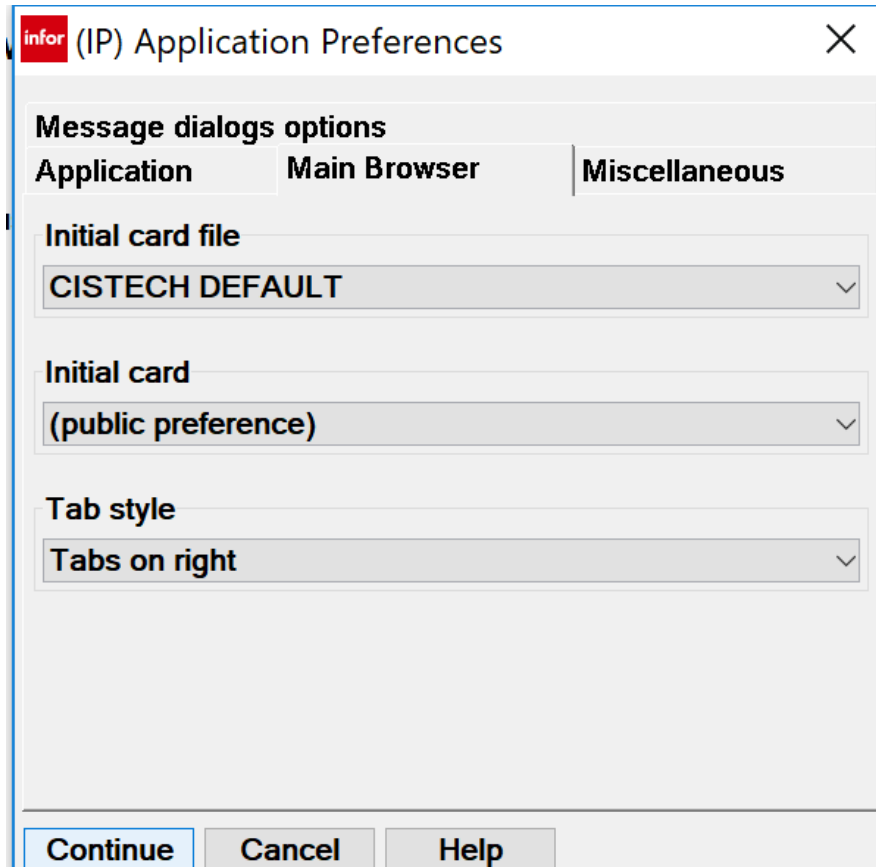
- Shop Supervisors worked only in green screen
- To help them transition, I created a single card with the objects to replace the inquiries they used in green screen
- Set the label of the object to include the green screen 'path'
- Added Workbenches to allow them to use a 'Dashboard-like' set of windows to facilitate inquiry
- Used System Preferences to make this the Shop Floor Supervisor's default card file & card

Setting Application Preferences



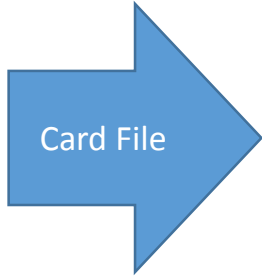
- Access Preferences from the 'Customize' pull down menu
- 'Application' card defines font
 - Small is the installed default font
- Use the 'User Font' option to set unique font size, bold, *italics*, etc.
 - HINT: Make the test environment font different from the live environment so that it's clear which environment you're in

Setting application Preferences



• Main Browser Preferences

- 'Initial Card File' defines the card file that will be displayed when signing on
- 'Initial Card' sets the active card
 - HINT: This won't work if you set a tabbed card as the Initial card
 - In a previous slide, the 'Materials' card was identified as a tabbed card. This would NOT be set as the initial card, instead set:
 - Inventory
 - Shipping
 - Receiving
 - As the initial card
- 'Tab Style' determines where the tabs are for the main PowerLink card file only



infor (IP) Infor XA Power-Link
File Customize Navigation Help
CISTECH DEFAULT

Warehouses Warehouse Locations Items Item Warehouses Item Locations Discrete Allocations Inventory Transaction History Inventory Count Groups

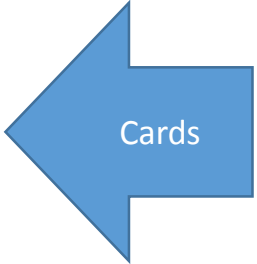
Inventory Statuses Transaction Reasons Transaction Code Descriptions

AM Plus
Customer Service
Engineering
Materials
Production
Finance
Procurement
Environment
Integrator
RF Physical Inventory
RF Pick/Pack/Ship
Product Structure Display

'Materials' is the active card. It is also a 'Tabbed' card, with tags at the bottom of the card for 'Inventory', 'Shipping' & 'Receiving'. When setting 'Initial Card' preference, use the card named at the bottom

Inventory Shipping Receiving

Powered by infor



Setting application Preferences

infor (IP) Application Preferences

Application Main Browser Miscellaneous Message dialogs options

Tab style
Tabs on right

Focus navigation style Left to right, top to bottom

Suppress tab for single-card card file

Navigation
 Only track last occurrence of same browser

History
Limit card attribute maintenance history to 5 entries

Export
Limit clipboard export to first 9999999 K characters

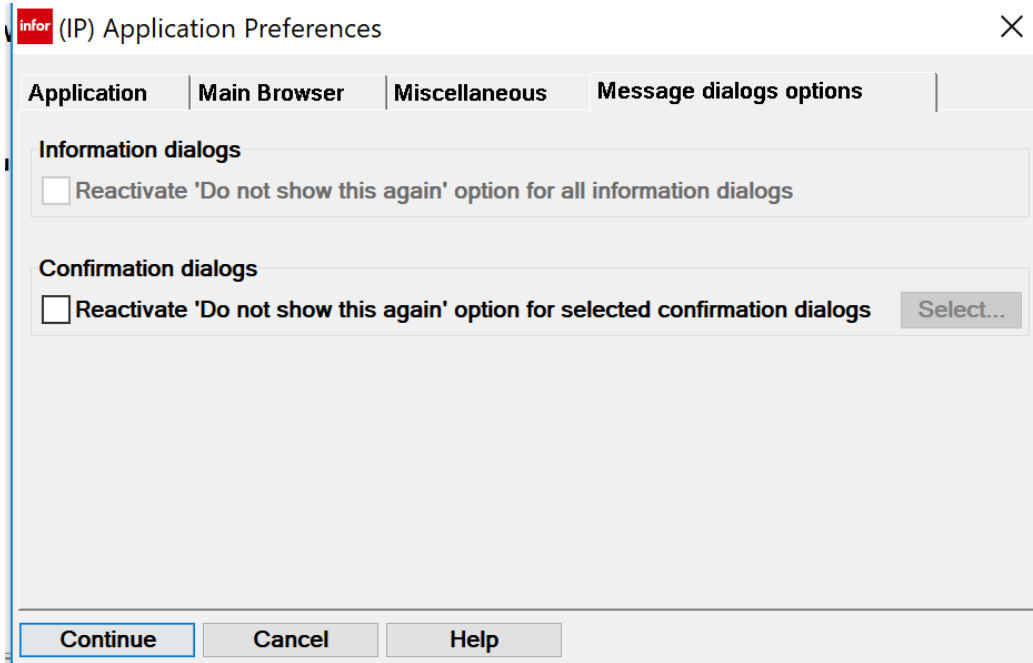
Open actions
Open action (system default)
<Alt> open action (system default)
<Ctrl> open action (system default)

Power Expand levels
(all)

Continue Cancel Help

- ‘Tab Style’ determines where the tabs are for any card file that is opened by double clicking on a line in a list (i.e. every other file in PowerLink)
- Suppress tab for single-card card file
- ‘Export’ controls the size of the clipboard when exporting data from PowerLink to paste in another application (i.e. Excel)
- ‘Open Actions’ determine what happens when you double click on a line in a list
 - Open in inquiry mode
 - Open in change mode, etc.
- Power Expand
 - Used for ‘explosion’ cards such as an indented BOM to open the card fully exploded

Setting application Preferences





- Message dialog options
- Allows the user to activate the 'Do not show this again' option for information and confirmation windows that open

Lists

Double clicking on an object will open a list of records.

This section will explain the options in a list: view, subset, sort & tool bar

List

- A list is made up of 3 separate elements:
 - VIEW
 - Defines the columns that will be displayed across the list
 - The view that's used will be the basis for the temporary card that a 'Quick Change'  action will build
 - SUBSET
 - A subset works like a filter in Excel or a 'select records' statement in a query to limit the rows of information displayed
 - SORT
 - The sort defines how the records in the subset are sorted
 - If using the 'Locate' button  (or 'Ctrl + F' or 'Ctrl + L') to jump to a specific record, the fields used for the sort will be the fields display in the Locate window
- There is no 'linkage' between view & subset. You can use any view with any subset

Sample List






Subsets Tool Bar Buttons

Views →






The screenshot shows the Infor IP Item Warehouses application window. The title bar reads "infor (IP) Item Warehouses". Below the title bar is a menu bar with "File Display Maintain Customize Navigation Help". A toolbar contains various icons for file operations and navigation. The main area displays a table titled "Item Warehouses" with columns: Item, Whs, Planner, Primary vendor, Dflt stock loc, On-hand, Stk UM, On-order, Allocated, and Available. The table lists various items such as AABALLY, ABALLY, AFXMD, etc., with their respective values in the On-hand and Available columns. Annotations with blue arrows point to the "General" view dropdown, the "Whs 1" subset dropdown, and the toolbar icons.

| Item | Whs | Planner | Primary vendor | Dflt stock loc | On-hand | Stk UM | On-order | Allocated | Available |
|-----------------|-----|---------|----------------|----------------|---------------|--------|----------|-----------|---------------|
| AABALLY | 1 | 0 | | | 3,963.000 | EA | | | 3,963.000 |
| ABALLY | 1 | 0 | | | 100.000 | EA | | | 100.000 |
| AFXMD | 1 | 0 14 | | | -1.000 | EA | | | -1.000 |
| AFX01CL | 1 | 0 | | | 1.000 | EA | | | 1.000 |
| B-AFXCL | 1 | 0 14 | | | 21.000 | EA | | | 21.000 |
| B-AFXCLI | 1 | 0 14 | | | | EA | | | |
| BC14N | 1 | 0 14 | | | | EA | | | |
| BC15N | 1 | 0 14 | | | | EA | | | |
| DESKTOP PC | 1 | 100 | | | | EA | | | |
| FFB6926 | 1 | 0 14 | | | 21.000 | EA | | | 21.000 |
| FFB6929 | 1 | 0 | | | 21.000 | EA | | | 21.000 |
| FHK03 | 1 | 0 14 | | | | EA | | | |
| FMC6701 | 1 | 0 | | | 21.000 | EA | | | 21.000 |
| FPV6701 | 1 | 0 14 | | | 21.000 | EA | | | 21.000 |
| FPV6903 | 1 | 0 14 | | | 21.000 | EA | | | 21.000 |
| I-L0102 | 1 | 0 | | | | EA | | | |
| IOR-100 | 1 | 0 | | | | EA | | | |
| MPA302 | 1 | 0 | | | 9,999,999.999 | EA | | | 9,999,999.999 |
| NI01 | 1 | 0 | | | | EA | | | |
| NPY8222DKSILFUM | 1 | 0 | | | 10.000 | LB | | 9.000 | 1.000 |
| QSA3 | 1 | 0 | | | | EA | | | |
| SLX120PWC | 1 | 0 | | FG01 | 40.000 | EA | | | 40.000 |
| SM1023 | 1 | 0 | | | | EA | | | |
| SN1000 | 1 | 0 | | | 106.000 | EA | | | 106.000 |
| TTOUTSIDE | 1 | 0 | | | | EA | | | |

Toolbar Buttons

- **Create/Add** is the button with the blank sheet of paper 
- **Change** is the button with the pencil 
- **Quick Change** is the button with the pencil with trailing lines 
 - Quick change will build a temporary card based on the view being displayed
 - Maintainable fields will be open for change
 - Use the 'Auto Advance' option (lower left corner of the card) to move automatically to the next item/order
 - If all items/orders have the same field being changed to the same value, use a change template so you don't have to key the information into each field
- **Delete** is the button with the trash can 
- **Copy** is the button with the 2 sheets of paper with text 

PowerLink buttons

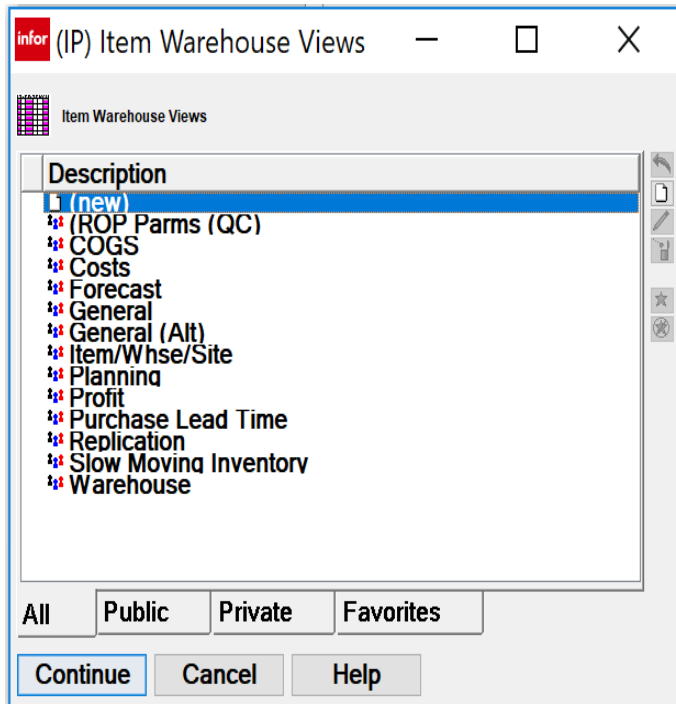
- **A Calendar** is available for date fields 
 - You can key the date manually or select from the calendar
- **A Magnifying Glass** button will allow you to search on the field 
(Like using F4 or ?| in green screen)
- **Right Justify** (same as using the + key/field exit in green screen) 
- **Open a locked field** (such as 'Ship To' Name/address use this button to
unlock 
- **Search/Locate** a record use the button with the spreadsheet &
magnifying glass 


Creating a List

Customizing A view

- Use the 'Customize' option from the Menu bar and select 'View'
- The view controls what information is in each column

Customizing a View



- When creating a new view, a list of existing views will be displayed
 - Click on the 'Create' button  With an existing view highlighted and the existing view will be copied
 - NOTE: Infor ships PowerLink with their views, subsets, cards, etc. YOU SHOULD NOT CHANGE THESE since new versions can replace them and you would lose your changes! For example, single click on General then click the 'Create' button to copy general and save it with a different name
 - Double click on 'New' at the top of the list to begin a new view from scratch

Customizing a View

Infor (IP) Edit Item Warehouse View

Item Warehouse View

Name: (temporary) Domain: Public Security: (none)

Presentation options

Scheme: (none)

Available attributes *Restricted List*

Description

- Externally controlled quantity
- Fixed order quantity
- Forecast quantity/period
- Forecast quantity/period - planning (calculated)
- Future allocation quantity
- In-transit on-hand quantity (calculated)
- In-transit on-hand quantity allocated (calculated)
- Incoming in-transit on-hand quantity
- Incoming in-transit total quantity
- Last date affecting quantity on hand
- Last date affecting quantity on hand - planning (calculated)
- Maximum quantity
- Minimum quantity
- Multiple quantity
- On-hand quantity (planning)
- Outgoing in-transit on-hand quantity
- Quantity adjusted this period

All By Object

Selected attributes

| Description | Column heading | Cursor | Label |
|-------------|----------------|--------|-----------|
| Warehouse | Whs | No | Warehouse |
| Item | Item | No | Item |

Save Save as ... Apply Cancel Help

- When customizing a view, the **‘Available Attributes’** section will show all fields from all files
- Select a field by double clicking on the field
- It will drop to the bottom of the list UNLESS you have single clicked (i.e. highlighted) a field in the **‘Selected Attributes’** section
 - If there is a highlighted field in Selected Attributes, PowerLink will add the new field immediately below the highlighted field
 - To UN-HIGHLIGHT a field, hold the ‘Ctrl’ key and single click on the record

Customizing a View

Item Warehouse View

Name: (temporary) Domain: Public Security: (none)

Presentation options
Scheme: (none)

Available attributes *Restricted List*

- Description
- + Item Warehouse
- + Default stock location
- + Enterprise Item
- + Item Planning
- + Item Revision
- + Item Warehouse Extension
- + Planner
- + Vendor

All **By Object**

Selected attributes

| Description | Column heading | Cursor | Label |
|-------------|----------------|--------|-----------|
| Warehouse | Whs | No | Warehouse |
| Item | Item | No | Item |

Save Save as ... Apply Cancel Help

- If you want to select the file that they field comes from, click on the 'By Object' tab
- Click on the + sign to the left of the file name and only the fields from that file will be displayed

Customizing a View

Available attributes

| Description |
|--|
| Default stock location |
| Default stock location (Item Revision) |
| Demand time fence |
| Department (Item Revision) |
| Department (Planner) |
| Description (Current Primary Bill Of Material) |
| Description (Current Primary Item Process) |
| Description (Enterprise Item) |
| Description (Item Revision) |
| Description (Warehouse Location Extension) |
| Description (Warehouse) |
| DFI identification number |
| DFI number qualifier |
| Dimensional UM |
| Discount lost last year |
| Discount lost last year (alternate currency) |
| Discount lost last year (local currency) |

All By Object

Selected attributes

- When you see the same field listed multiple times in the view, it means that the same field name exists in multiple records
 - The field name with no parenthesis means that it's coming from the primary file
 - The example to the right is from the Item Warehouse (Balance) record, there is no 'Description' field in that record, but, if there were, it would be displayed without anything following in parenthesis
 - The file name in parenthesis after the field name is showing the file name that the field is from

Customizing a View

The screenshot shows the '(IP) View definition' dialog box for the field 'Quantity on-hand'. The field is defined as 'Numeric (9,999,999.999)'. The dialog includes several configuration options:

- Column heading:** A text box containing 'On-hand'.
- Number of decimals to display:** A spinner box set to '3'.
- Rounding method:** A dropdown menu set to 'Half adjust'.
- Content:** A dropdown menu set to 'Value'.
- Presentation width:** A text box containing '12'.
- Column statistics:** A dropdown menu set to '(none)'.
- Scheme:** A dropdown menu set to '(Same as view)'.

At the bottom, there is a 'Presentation' section with a 'Quick change' button, and three main buttons: 'Continue', 'Cancel', and 'Help'.

- When adding a field to the view you can change the:
 - Column Heading
 - NOTE: changing the column heading does not change the field description, it only changes the label for the column in the view
 - If you want a 2 or 3 line Column Heading, hold Ctrl and press Enter to go to the next line
 - Number of decimals
 - NOTE: change the decimals does not affect the data only the number of decimals in the view
 - Width of the field
 - To fit more fields on the screen, you may want to change the width of the fields. The default number is the number of characters in the field definition which is displayed in the upper right corner

Customizing a View

(IP) View definition

Quantity allocated (customer orders) **Numeric (9,999,999.999)**

Column heading
CO Alloc

0 Number of decimals to display

Rounding method Half adjust

Content Value

Presentation width 6

Column statistics (none)

Scheme (none)

Presentation Quick Total

Average

Minimum

Maximum

Continue Cancel

• Column Statistics

- For numeric fields, there are 6 options that can be selected (only 1 can be selected for a column)
 - No statistic
 - Count the number of records (also available for Alpha-Numeric fields)
 - Sum the values in the column
 - Calculate an average
 - Show the lowest number (minimum)
 - Show the highest number (maximum)
- If you select a statistic and it doesn't display at the bottom of the column, click 'File' then 'Calculate Column Statistics' from the list

Customizing a View

The screenshot shows a dialog box titled "(IP) View definition" with a close button (X) in the top right corner. The main title is "Stocking UM (Item Revision)" and the character code is "Character (2A)".

Fields and options include:

- Column heading:** A text box containing "Stk UM".
- Display value in mixed case:** An unchecked checkbox.
- Content:** A dropdown menu with "Value" selected. The dropdown list is open, showing options: "Value", "Alias", and "Both".
- Presentation width:** A dropdown menu with "Value" selected.
- Column statistics:** A dropdown menu with "(none)" selected.
- Scheme:** A dropdown menu with "(Same as view)" selected.
- Presentation:** A button labeled "Quick change".
- Buttons:** "Continue", "Cancel", and "Help" buttons at the bottom.

- When adding a field that is a code file (i.e. Item Class) you can specify that, for the view, you want the:
 - VALUE – 4 character code
 - ALIAS – description of the code
 - BOTH – both value and alias
- There are also XA defined fields (Item Type) that provide the same options

Sample List with new view

infor (IP) Item Warehouses

File Display Maintain Customize Navigation Help

Conf Pre... Whs 1

Item Warehouses

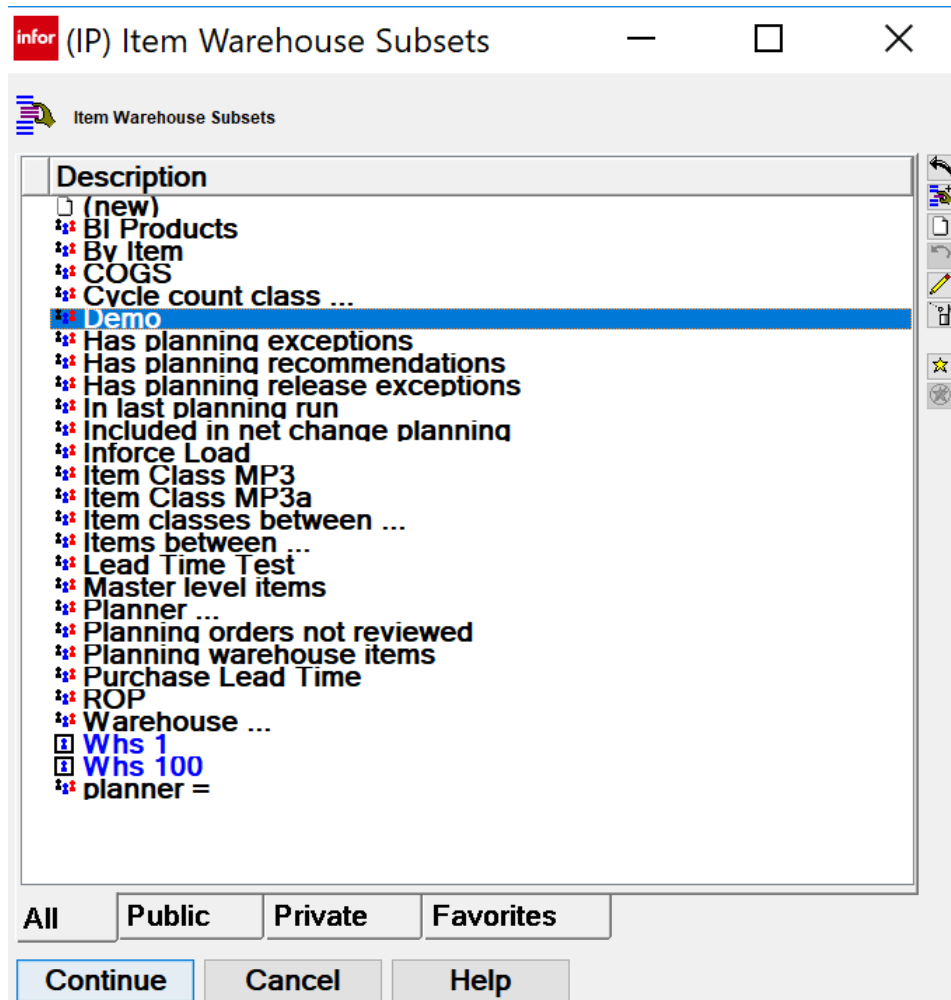
| Whs | Item | Description | Stk UM | On-hand | MO Qty | PO Qty | CO Alloc | MO Alloc | On-hand \$ |
|-----|--------|-------------------------|-----------|---------------|--------|--------|----------|----------|---------------|
| 1 | 1100 | Processor, 166 Mhz | EA = Each | 9,990.000 | 0 | 0 | 4 | 0 | 3,327,703.96 |
| 1 | 1100OC | Stepping Stones | EA = Each | 1,000,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1101 | PROCESSOR, 200 | EA = Each | 772.000 | 0 | 0 | 14 | 0 | 347,850.46 |
| 1 | 1101OC | Concrete | EA = Each | 0.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1102 | PROCESSOR, 200 | EA = Each | 913.000 | 0 | 0 | 4 | 0 | 647,064.56 |
| 1 | 1102OC | SAND | EA = Each | 0.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1103 | PROCESSOR, 3XC | EA = Each | 813.000 | 0 | 0 | 0 | 0 | 619,713.31 |
| 1 | 1104 | SPEAKERS | EA = Each | 16,225.000 | 0 | 900 | 516 | 0 | 1,025,582.25 |
| 1 | 1105 | MOUSE | EA = Each | 7,670.000 | 0 | 0 | 135 | 0 | 91,963.30 |
| 1 | 1106 | KEYBOARD | EA = Each | 9,983.000 | 0 | 0 | 32 | 0 | 313,965.35 |
| 1 | 1107 | KEYBOARD ERGO | EA = Each | 14,885.000 | 0 | 0 | 702 | 0 | 530,650.25 |
| 1 | 1108 | MOUSE ERGO | EA = Each | 81.000 | 0 | 0 | 11 | 0 | 1,057.05 |
| 1 | 1109 | MOUSE PAD | EA = Each | 49,980.000 | 0 | 0 | 0 | 0 | 49,980.00 |
| 1 | 1110 | SOFTWARE, WIN 95 | EA = Each | 1,000.000 | 0 | 0 | 0 | 0 | 29,000.00 |
| 1 | 1111 | SOFTWARE, WIN 98 | EA = Each | 10,000.000 | 0 | 0 | 0 | 0 | 890,000.00 |
| 1 | 1112 | SOFTWARE, WIN NT CLIENT | EA = Each | 20,000.000 | 0 | 0 | 0 | 0 | 5,980,000.00 |
| 1 | 1113 | SOFTWARE, WIN NT SERVER | EA = Each | 10,000.000 | 0 | 0 | 0 | 0 | 10,990,000.00 |
| 1 | 1114 | PROCESSOR, 4XC | EA = Each | 10,000.000 | 0 | 0 | 0 | 0 | 7,622,550.00 |
| 1 | 1115 | PROCESSOR, 45X | EA = Each | 10,000.000 | 0 | 0 | 0 | 0 | 7,622,550.00 |
| 1 | 1200 | MOTHERBOARD, Type I | EA = Each | 9,995.000 | 0 | 0 | 5 | 0 | 1,971,698.66 |

Subsets

Creating a Subset

- Subsets limit the ROWS of data to be included.
- They are similar to a filter in Excel or a 'Select Records' statement in a query
- The actions to create a subset are similar to the actions to create a view
- There can be multiple fields in a subset joined by either 'And' or 'Or'
 - Using the 'Or' option means that you are starting over.
 - For example, if I wanted all records in warehouse 1 with a quantity on hand for Item Classes A or B, my statement would read
 - Warehouse = 1
 - And Quantity on hand not equal to 0
 - And Item Class = A
 - OR Warehouse = 1
 - And Quantity on Hand not equal to 0
 - And Item Class = B
 - For those of you who are trying to tell me now that I could have used a list in the Item Class field, I'm aware of that but trying to make a point about how to use an 'Or' statement

Customizing a Subset



- The same rules that were explained about views work the same way with subsets
 - Double clicking on 'New' at the top of the list starts a new subset
 - Highlighting an existing view and clicking on the create button on the right side will copy the existing view and allow you to make additions, changes or deletes then assign a new name

Customizing a Subset

infor (IP) Edit Item Warehouse Subset

Item Warehouse Subset

Name: (temporary) Domain: Public Security: (none)

Subset Properties

Defer calculation of column statistics

Print options

Statistics

Blank lines before: 0

Message:

Scheme: (none)

Available attributes

Description
10 Character
1099 recipient (derived)
1st subdivision empty
20 Characters
2nd subdivision empty
3rd subdivision empty
4th subdivision empty
5th subdivision empty
Abbreviation
Account number (Item Revision Purch...
Accounting entitv

All By Object

Selected attributes

| Desc... | Relati... | Oper... | Prom... |
|---------|-----------|---------|---------|
|---------|-----------|---------|---------|

Save Save as ... Apply Cancel Help

- Fields in the 'Available Attributes' section are selected as criteria for the various filters

Customizing a Subset

(IP) Subset definition

Warehouse

Character (3A)

Relational operator

Containment
Inequality
Equality

Equal
 Not equal

Operand type

Constant value List
 Field value Range

Value

Prompt for value Preference

Logical operator

And Or

Continue Cancel Help

- There are multiple 'cards' on the left side of the window to choose from:
 - Equality
 - Inequality (greater than/less than)
 - Containment (contains, begins, ends)
- Operand Type defines
 - Single value
 - Multiple values (list)
 - Range
 - Field Value – select a field from a list
- Value is the information in the record that is being matched
 - Prompt for value will display a pop up window
 - Preference will use the setting in your preferences

Customizing a Subset

(PG) Subset definition

Transaction date

Date (mm/dd/yyyy)

Relational operator

Equality

Inequality

Greater than

Greater or equal

Less than

Less or equal

Operand type

Constant value List

Field value Range

Value

(specific date) / /

(specific date)

-2 years

-1 year

-11 months

-10 months

-9 months

-8 months

-7 months

Logical operator

And Or

Continue Cancel Help

- Using date fields
 - Typically use the 'Inequality' card to select greater or less than to get a range of dates
 - Instead of entering a specific date that you have to constantly change, select a value from a range of -2 years to +2 years
 - As the date on the iSeries/AS400 changes, so will the date in your subset

Customizing a Subset

(IP) Subset definition ✕

Date of last usage Date (mm/dd/yyyy)

Relational operator

Equality

Equal

Not equal

Logical operator

And Or

Operand type

Constant value List

Field value Range

Range

(specific range) ▼

(specific range)

(last year)

(last quarter)

(last month)

(last week)

(current week)

(current month)

(current quarter) ▼

Continue Cancel Help

- If the option for 'Range' of dates is selected, the pull down options for the range can provide the same automatic update of date ranges
- If you want to enter the date range manually each time you apply the subset, use the 'Inequality' tab
 - Select 'Greater Than or Equal' and check 'Prompt for value'
 - Then add the same date field with 'Less than or equal' and check 'Prompt for value'
 - Each time the subset is applied, the date range window will be displayed

List with Subset of 'WHSE = 1 & QTY NE 0'

infor (IP) Item Warehouses

File Display Maintain Customize Navigation Help

Conf Pre... Whs 1 w...

Item Warehouses

| Whs | Item | Description | Stk UM | On-hand | MO Qty | PO Qty | CO Alloc | MO Alloc | On-hand \$ |
|-----|-----------------|--------------------------------|--------------|---------------|--------|--------|----------|----------|---------------|
| 1 | AABALLY | AABALLY | EA = Each | 3,963.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | ABALLY | ABALLY | EA = Each | 100.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | AFXMD | AF/X BODY | EA = Each | -1.000 | 0 | 0 | 0 | 0 | -85.00 |
| 1 | AFX01CL | '64-'72 BODY GM DISC CONV(LA) | EA = Each | 1.000 | 0 | 0 | 0 | 0 | 166.82 |
| 1 | B-AFXCL | AFX FRONT CONV | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 54.60 |
| 1 | FFB6926 | OM-LFT FRNT POW DISC BRAKE | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 210.00 |
| 1 | FFB6929 | OM-RIGHT FRONT POW DISC BR | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 420.00 |
| 1 | FMC6701 | OM-REAR MSTR CYL, LINE SQU | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 21.00 |
| 1 | FPV6701 | OM MSTR CYL TO PROP.VALVE | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 21.00 |
| 1 | FPV6903 | OM PROPOR.VALVE TO DIST B | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 21.00 |
| 1 | MPA302 | MPA302 | EA = Each | 9,999,999.999 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | NPY8222DKSILFUM | Yarn 8222 Dark Silver 2000/fz | LB = Pounds | 10.000 | 0 | 0 | 9 | 0 | 0.00 |
| 1 | SLX120PWC | SLX 120HP POLARIS MARINE PWC | EA = Each | 40.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | SN1000 | Serial Number Item | EA = Each | 106.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | VS30.63AB | Vista Shag Dk Silver Action Bk | SY = Sq Yard | 6,493.330 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 055553 | Socle Saillie P17 IP44 16A ACH | EA = Each | -1.000 | 0 | 0 | 0 | 0 | -21.00 |
| 1 | 1000 | PC, 166 MHZ, DESKTOP | EA = Each | 106.000 | 121 | 0 | 237 | 0 | 67,502.11 |
| 1 | 1000OC | BRICKS | EA = Each | 10,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1001 | PC, 900 MHZ, DESKTOP | EA = Each | 14,710.000 | 0 | 0 | 178 | 0 | 14,932,536.56 |
| 1 | 1002 | PC, 266 MHZ, DESKTOP | EA = Each | 10,000.000 | 0 | 0 | 30 | 0 | 13,555,682.50 |
| 1 | 1003 | PC, 300 MHZ, DESKTOP | EA = Each | 10,009.000 | 0 | 0 | 0 | 0 | 14,103,679.40 |
| 1 | 1006 | PC ASSY | EA = Each | 20,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1100 | Processor, 166 Mhz | EA = Each | 9,990.000 | 0 | 0 | 4 | 0 | 3,327,703.96 |
| 1 | 1100OC | Stepping Stones | EA = Each | 1,000,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1101 | PROCESSOR, 200 | EA = Each | 772.000 | 0 | 0 | 14 | 0 | 347,850.46 |
| 1 | 1102 | PROCESSOR, 200 | EA = Each | 913.000 | 0 | 0 | 4 | 0 | 647,064.56 |
| 1 | 1103 | PROCESSOR, 3XC | EA = Each | 813.000 | 0 | 0 | 0 | 0 | 619,713.31 |
| 1 | 1104 | SPEAKERS | EA = Each | 16,225.000 | 0 | 900 | 516 | 0 | 1,025,582.25 |



Temporary Subset


The screenshot shows the Infor IP Item Warehouses application. The main window title is "infor (IP) Item Warehouses". Below the title bar is a menu bar with "File", "Display", "Maintain", "Customize", "Navigation", and "Help". A toolbar contains various icons for file operations and data manipulation. The main area displays a table titled "Item Warehouses". The table has four columns: "Whs", "Item", "Description", and "Stk UM". The "Whs" column contains the value "1" for all rows. The "Item" column lists various part numbers like AABALLY, ABALLY, AFXMD, AFX01CL, B-AFXCL, FFB6926, FFB6929, FMC6701, FPV6701, FPV6903, and MPA302. The "Description" column contains corresponding descriptions, such as "'64-'72 BODY GM DISC CONV(LA)", "AFX FRONT CONV", "OM-LFT FRNT POW DISC BRAKE", "OM-RIGHT FRONT POW DISC BR", "OM-REAR MSTR CYL, LINE SQU", "OM MSTR CYL TO PROP.VALVE", "OM PROPOR.VALVE TO DIST B", and "MPA302". The "Stk UM" column contains the value "EA = Ea" for all rows. A context menu is open over the "Description" column, showing options: "Customize >", "Column ...", "Statistics", and "Subset criteria ...". The "Subset criteria ..." option is highlighted in blue.

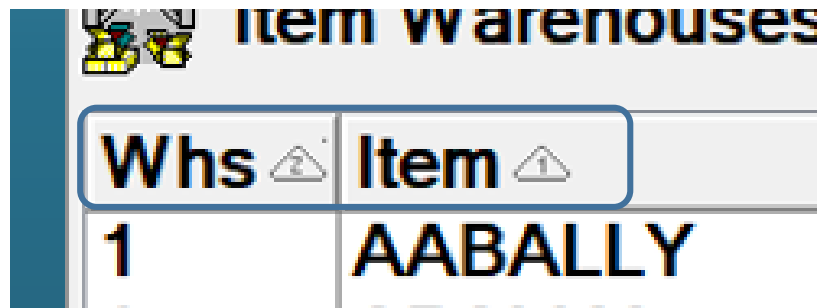
| Whs | Item | Description | Stk UM |
|-----|-----------------|-------------------------------|---------|
| 1 | AABALLY | | EA = Ea |
| 1 | ABALLY | | EA = Ea |
| 1 | AFXMD | | EA = Ea |
| 1 | AFX01CL | '64-'72 BODY GM DISC CONV(LA) | EA = Ea |
| 1 | B-AFXCL | AFX FRONT CONV | EA = Ea |
| 1 | FFB6926 | OM-LFT FRNT POW DISC BRAKE | EA = Ea |
| 1 | FFB6929 | OM-RIGHT FRONT POW DISC BR | EA = Ea |
| 1 | FMC6701 | OM-REAR MSTR CYL, LINE SQU | EA = Ea |
| 1 | FPV6701 | OM MSTR CYL TO PROP.VALVE | EA = Ea |
| 1 | FPV6903 | OM PROPOR.VALVE TO DIST B | EA = Ea |
| 1 | MPA302 | MPA302 | EA = Ea |
| 4 | MPV8222DKSH FUM | MPV 8222 Dash Silver 2000/5 | EA = Ea |



- If you right click on the column heading you will have an option to create a temporary subset for that column
 - The 'Selection Criteria' card will be displayed to allow for Equal, Inequality or Containment
- If you use a Temporary Subset, hold the 'CTRL' key and press 'Z' (i.e. undo) to return to the original subset

Sorts

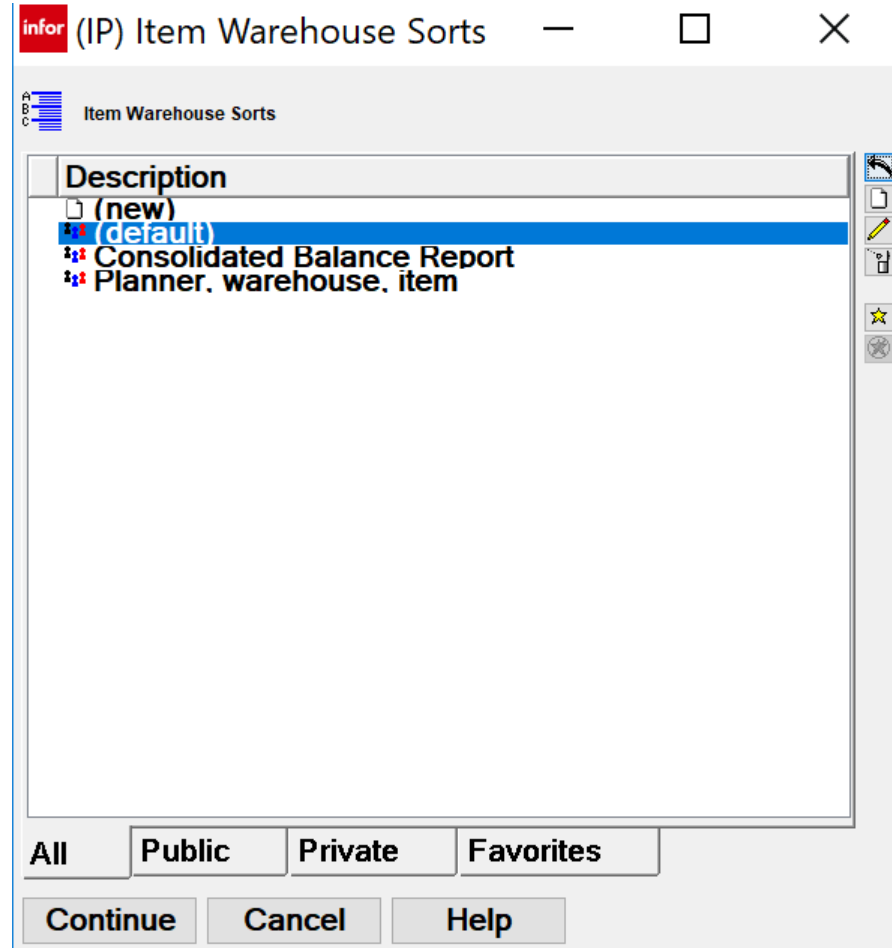
Sorts

- Any field can be used to sort the list with
- In the title of the column, the sort fields will have a triangle with a number in the sort fields
 - If the triangle is pointing up, it is an 'ascending' sort
 - If the triangle is pointing down, it is a 'descending' sort
 - The number in the triangle will designate the first sort field, second sort field, etc.
- You can hover the mouse over the 'Locate' button  and the sort fields will be displayed



| Whs  | Item  |
|---|---|
| 1 | AABALLY |

Creating Sorts



- Again, same process as views and subsets

Creating Sorts

The screenshot shows the 'infor (IP) Edit Item Warehouse Sort' dialog box. At the top, there are three fields: 'Name' with the value '(temporary)', 'Domain' with a dropdown set to 'Public', and 'Security' with a dropdown set to '(none)'. Below these is a section titled 'Available attributes' containing a list of fields such as 'Description', 'Implementation status', 'In-transit on-hand quantity (calculated)', 'In-transit on-hand quantity allocated (ca...', 'Include inventory balance', 'Incoming in-transit on-hand quantity', 'Incoming in-transit total quantity', 'Inside diameter', 'Inspect on receipt (Item Revision)', 'Inventory code (Item Revision)', 'Inventory status', 'Item', 'Item (Current Base Price)', 'Item (Current Primary Item Process)', 'Item (Item Revision Cost)', and 'Item (Item Revision Purchase)'. The 'Item' field is currently selected. Below the list are two buttons: 'All' and 'By Object'. Underneath is a section titled 'Selected attributes' which contains a table with three columns: 'Description', 'Sort sequ...', and 'Subtotals'. The table is currently empty. At the bottom of the dialog are five buttons: 'Save', 'Save as ...', 'Apply', 'Cancel', and 'Help'.

- Multiple fields can be selected for a sort
- The order of the fields in the 'Selected Attributes' section will determine the sort of the list of records

Creating sorts

(IP) Sort definition ✕

Item Character (15A)

Sort sequence

Ascending Descending

Print options

Subtotals

Blank lines before

Message

Scheme

Blank lines after

Page break after

- Select 'Ascending' or 'Descending' for the field
- Can insert 'Sub-Totals' which are used when exporting the list to Excel

Creating Sorts


infor (IP) Item Warehouses

File Display Maintain Customize Navigation Help

Conf Pre... Whs 1 w... Locate

Item Warehouses

| WHS | Item | Description | Sort: (default) | Stk UM | On-hand | MO Qty | PO Qty | CO Alloc | MO Alloc | On-hand \$ |
|-----|-----------------|-------------|--------------------------|--------------|---------------|--------|--------|----------|----------|---------------|
| 1 | AABALLY | AA | Item Ascending | EA = Each | 3,963.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | ABALLY | AB | Warehouse Ascending | EA = Each | 100.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | AFXMD | AFX | X BODY | EA = Each | -1.000 | 0 | 0 | 0 | 0 | -85.00 |
| 1 | AFX01CL | '64-'72 | BODY GM DISC CONV(LA) | EA = Each | 1.000 | 0 | 0 | 0 | 0 | 166.82 |
| 1 | B-AFXCL | AFX | FRONT CONV | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 54.60 |
| 1 | FFB6926 | OM-LFT | FRNT POW DISC BRAKE | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 210.00 |
| 1 | FFB6929 | OM-RIGHT | FRONT POW DISC BR | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 420.00 |
| 1 | FMC6701 | OM-REAR | MSTR CYL, LINE SQU | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 21.00 |
| 1 | FPV6701 | OM | MSTR CYL TO PROP.VALVE | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 21.00 |
| 1 | FPV6903 | OM | PROP.VALVE TO DIST B | EA = Each | 21.000 | 0 | 0 | 0 | 0 | 21.00 |
| 1 | MPA302 | MPA | 302 | EA = Each | 9,999,999.999 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | NPY8222DKSILFUM | Yarn | 8222 Dark Silver 2000/fz | LB = Pounds | 10.000 | 0 | 0 | 9 | 0 | 0.00 |
| 1 | SLX120PWC | SLX | 120HP POLARIS MARINE PWC | EA = Each | 40.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | SN1000 | Serial | Number Item | EA = Each | 106.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | VS30.63AB | Vista | Shag Dk Silver Action Bk | SY = Sq Yard | 6,493.330 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 055553 | Socle | Saillie P17 IP44 16A ACH | EA = Each | -1.000 | 0 | 0 | 0 | 0 | -21.00 |
| 1 | 1000 | PC, | 166 MHZ, DESKTOP | EA = Each | 106.000 | 121 | 0 | 237 | 0 | 67,502.11 |
| 1 | 1000OC | BRICKS | | EA = Each | 10,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1001 | PC, | 900 MHZ, DESKTOP | EA = Each | 14,710.000 | 0 | 0 | 178 | 0 | 14,932,536.56 |
| 1 | 1002 | PC, | 266 MHZ, DESKTOP | EA = Each | 10,000.000 | 0 | 0 | 30 | 0 | 13,555,682.50 |
| 1 | 1003 | PC, | 300 MHZ, DESKTOP | EA = Each | 10,009.000 | 0 | 0 | 0 | 0 | 14,103,679.40 |
| 1 | 1006 | PC | ASSY | EA = Each | 20,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1100 | Processor, | 166 Mhz | EA = Each | 9,990.000 | 0 | 0 | 4 | 0 | 3,327,703.96 |
| 1 | 1100OC | Stepping | Stones | EA = Each | 1,000,000.000 | 0 | 0 | 0 | 0 | 0.00 |
| 1 | 1101 | PROCESSOR, | 200 | EA = Each | 772.000 | 0 | 0 | 14 | 0 | 347,850.46 |
| 1 | 1102 | PROCESSOR, | 200 | EA = Each | 913.000 | 0 | 0 | 4 | 0 | 647,064.56 |
| 1 | 1103 | PROCESSOR, | 3XC | EA = Each | 813.000 | 0 | 0 | 0 | 0 | 619,713.31 |
| 1 | 1104 | SPEAKERS | | EA = Each | 16,225.000 | 0 | 900 | 516 | 0 | 1,025,582.25 |
| 1 | 1105 | MOUSE | | EA = Each | 7,670.000 | 0 | 0 | 135 | 0 | 91,963.30 |
| 1 | 1106 | KEYBOARD | | EA = Each | 9,983.000 | 0 | 0 | 32 | 0 | 313,965.35 |
| 1 | 1107 | KEYBOARD | ERGO | EA = Each | 14,885.000 | 0 | 0 | 702 | 0 | 530,650.25 |
| 1 | 1108 | MOUSE | ERGO | EA = Each | 81.000 | 0 | 0 | 11 | 0 | 1,057.05 |
| 1 | 1109 | MOUSE | PAD | EA = Each | 49,980.000 | 0 | 0 | 0 | 0 | 49,980.00 |

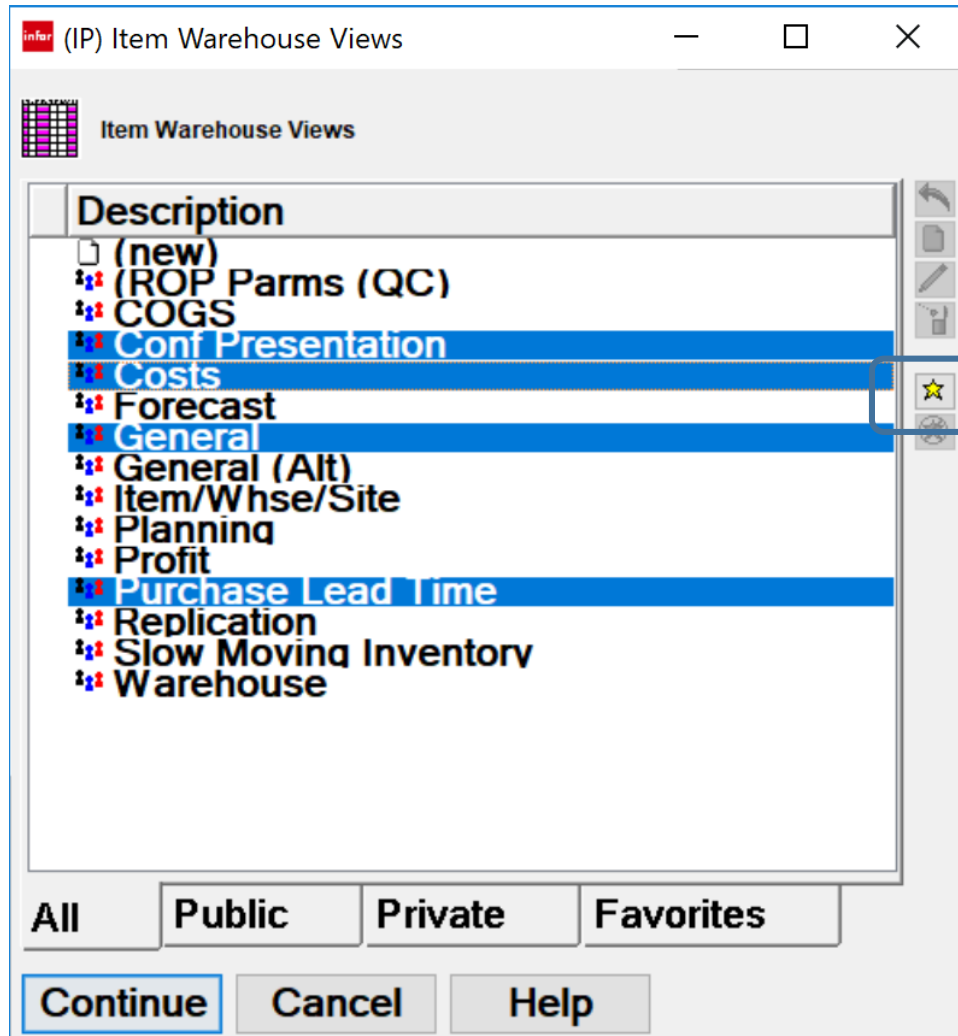
If you hover the mouse over the 'Locate' button  the sort fields will be displayed



Favorites

Favorites

- This option is, in my opinion, the most underused and biggest contributor to efficiency in PowerLink
- Setting favorites in views & subsets will limit the options shown when using the pull down window to select the view/subset to apply
- All views/subsets can still be accessed to use one that is not flagged as a favorite

Favorites



- Select the views/subsets that you want to flag as a favorite by holding down the 'Ctrl' key and clicking on the options
- Click on the 'Favorite' button 
- The gold star will appear to the left of the options selected as favorites
- To remove an option as a favorite, click on the 'Remove Favorite' button 

Favorites

- Before

infor (IP) Item Warehouses

File Display Maintain Customize Naviga

General (all recor...)

Whouses

| | Whs | Planner |
|--|-----|---------|
| | CBP | 200 |
| | CBP | 0 |
| | CBP | 0 |
| | AUS | 0 |
| | CAM | 0 |
| | 1 | 0 |
| | AUS | 513 |

- After

infor (IP) Item Warehouses

File Display Maintain Customize Naviga

General (all recor...)

Conf Present
Costs Whouses

| | Whs | Planner |
|--|-----|---------|
| | CBP | 200 |
| | CBP | 0 |
| | CBP | 0 |
| | AUS | 0 |
| | CAM | 0 |
| | 1 | 0 |
| | AUS | 513 |

Templates

Templates

infor (IP) Purchase Orders

File Display **Maintain** Customize Navigation Help

| General ... | Create | Insert | |
|-------------|-----------------------------|----------|------------------------------|
| Purchas | Change | | |
| | Quick Change | | |
| Order ^ | Delete | Delete | |
| PADRIAN | Copy | | Supply 60 |
| PI00002 | Cancel | | Supply 60 |
| P000001 | Activate | | oration 60 |
| P000501 | Change Replication Settings | | Supply 60 |
| P000509 | Normal Close | | Supply 60 |
| P000534 | Force Close | | Supply 60 |
| P000625 | Receive Complete | | Metal Fabrication - Tampa 60 |
| P000626 | Undo Close | | Supply Int'l 60 |
| P000627 | Vendor Accept | | Metal Fabrication - Tampa 60 |
| P000628 | | | Supply Int'l 60 |
| P000629 | Mass Force Close | | Supply 60 |
| P000630 | Mass Change | | Metal Fabrication - Tampa 60 |
| P000631 | Mass Change Comments | | 60 |
| P000632 | Mass Delete | | Supply 60 |
| P000633 | | | Supply 60 |
| P000634 | Buyer options > | | Supply 60 |
| P000635 | Vendor options > | | Supply 60 |
| P000636 | Warehouse Address options > | | Supply 60 |
| P000637 | Templates > | | 60 |
| P000639 | | | 60 |
| P000640 | 107650 | Americas | 60 |
| P000641 | 107650 | Americas | 60 |
| P000643 | 107650 | Americas | 60 |
| P000645 | 107650 | Americas | Supply 60 |

Templates >

- Create Templates ...
- Copy Templates ...
- Change Templates ...

- Templates are used when you create, change or copy information
- Use of templates will reduce keystrokes and help insure data accuracy
- Used for MO's, PO's & CO's in addition to items, item warehouses, etc.

Templates

(IP) Template definition

Bill-to address 1

Character (35A)

Usage

- Provide default value only
- Prompt for value only
- Provide default value only
- Prompt for value and provide default value

Prompt options

- Retain previous value
- Position cursor

0 Number of indents

Label: Bill-to address 1

Content: Value

Visual control: Entry field

Continue Cancel Help

- 3 'Usage' options when creating a template:
 - **Prompt for value only**
 - Adds the field to the card with no default value
 - **Prompt for value and provide default value**
 - Add the field to the card
 - Shows the default value which can be changed
 - **Provide default value only**
 - Will add the default value to the field without displaying the field on the card
- Options
 - Retain previous value
 - Leaves the information from the last added order or record in the field
 - Position cursor
 - Designates the active field when adding a record

Templates

Options

Card file (system default) Initial card (system default)

Return here to create another Preview before create Focus navigation style (application preference)

Available attributes

Description

- Free on board description
- Freight charge
- Freight nature
- Freight tax class
- Freight tax transaction type
- Freight unit
- Hold from print
- IFM approver
- Include item quantities (derived)
- Maintenance control
- Notes method

All By Object

Selected attributes

| | Description | Label | Default value | Prompt | Cursor | Retain | Indents |
|-------------------------------------|-------------------|-------------------|---------------|--------|--------|--------|---------|
| <input checked="" type="checkbox"/> | Order | Order | | Yes | No | Yes | 0 |
| <input checked="" type="checkbox"/> | Buyer | Buyer | | Yes | No | Yes | 0 |
| <input checked="" type="checkbox"/> | Vendor | Vendor | | Yes | No | Yes | 0 |
| <input checked="" type="checkbox"/> | Warehouse | Warehouse | | Yes | No | Yes | 0 |
| <input type="checkbox"/> | Bill-to address 1 | Bill-to address 1 | 998 | Yes | No | No | 0 |
| <input type="checkbox"/> | Ship-to address 1 | Ship-to address 1 | 999 | No | No | Yes | 0 |
| <input type="checkbox"/> | FOB | FOB | OUR DOCK | No | No | Yes | 0 |

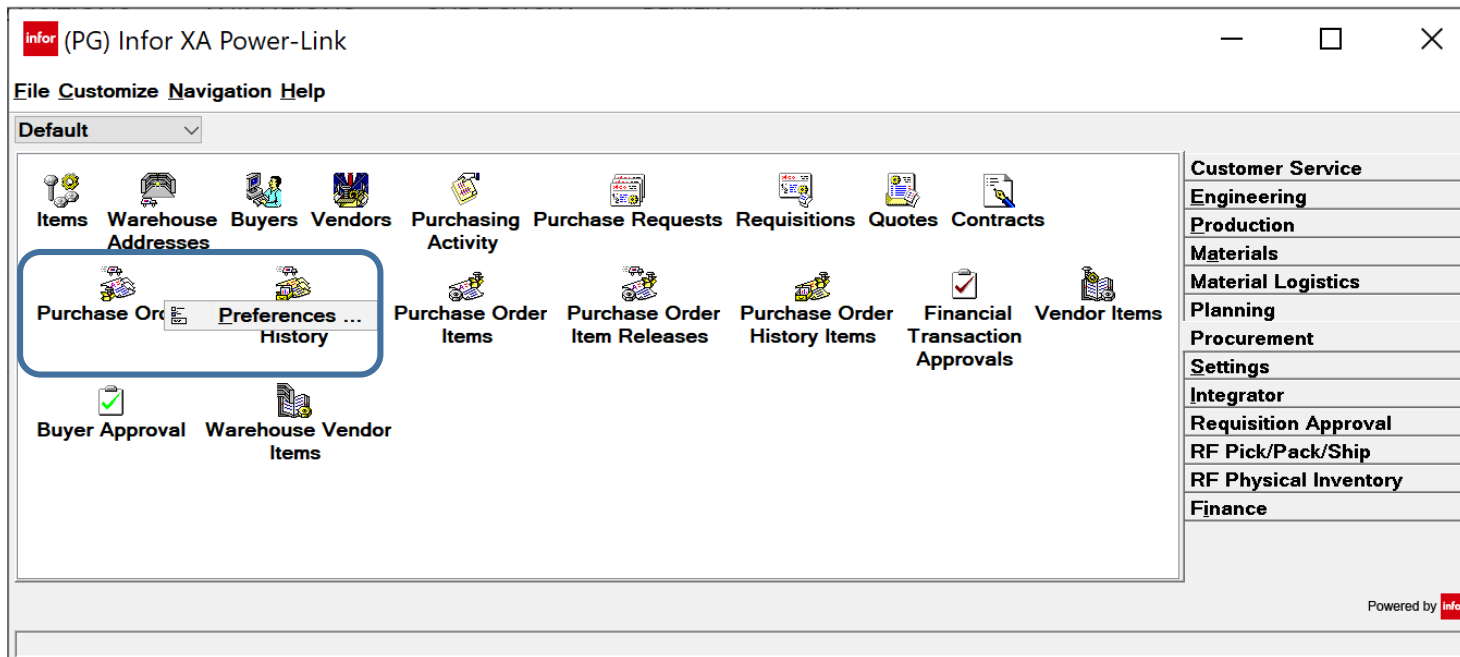
Save Save as ... Apply Cancel Help

- Can define the card file and initial card to be displayed when using the template
- Can check/un-check 'Return here to create another' and 'Preview before create'
- In the 'Selected Attributes' section, fields with a check to the left are the fields that will be shown on the create window

Object Preferences

Setting Object preferences

- Can right click on any object the main card file to set personal preferences
- Can also use (from the menu bar) 'Customize' then select 'Preferences'
- Preferences are designed to make you more efficient when working in PowerLink/XA and are the most underused options in PowerLink/XA



Object Preferences - General

The screenshot shows a dialog box titled "infor (IP) Purchase Order Preferences" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Defaults" and "Options".

Defaults:

- Buyer: (public preference) ▾
- Warehouse: (public preference) ▾

Options:

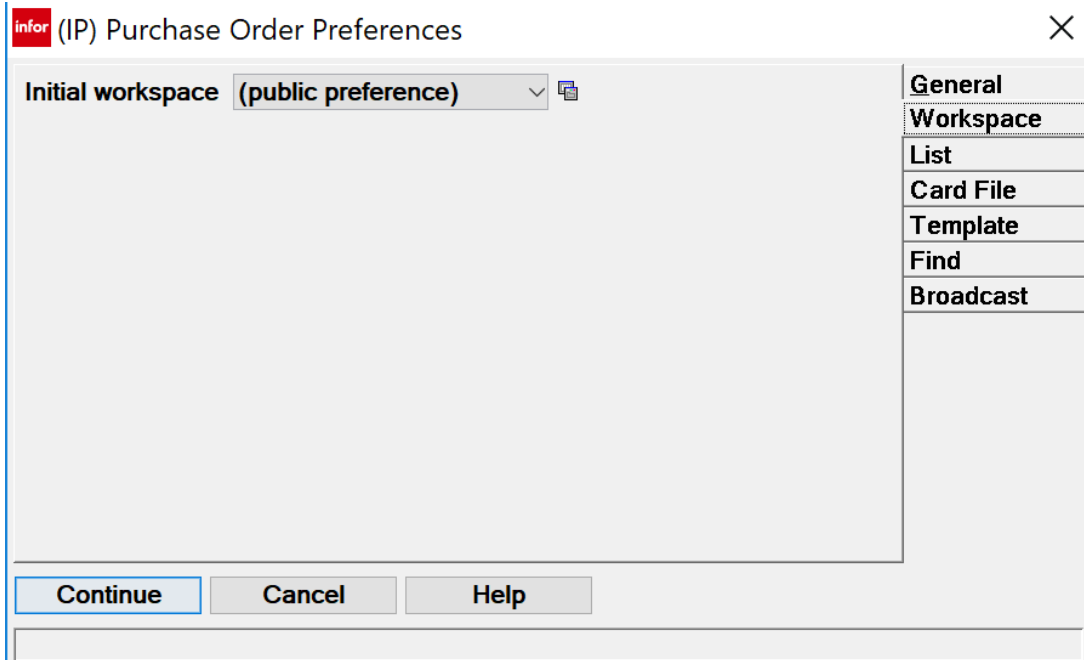
- Flag changes as revisions: (public preference) ▾
- Receive Complete Template: (last used) ▾ [icon]

At the bottom of the dialog, there are three buttons: "Continue" (highlighted with a blue border), "Cancel", and "Help".

On the right side of the dialog, there is a vertical list of tabs: "General" (selected), "Workspace", "List", "Card File", "Template", "Find", and "Broadcast".

- Sets default values for specific fields
- Options will change depending on the file

Object Preferences - Workspace



- Workspaces define multiple values for a file:
 - View
 - Subset
 - Sort
 - Toolbar
- Useful to prevent having to select each individually

Object Preferences - List

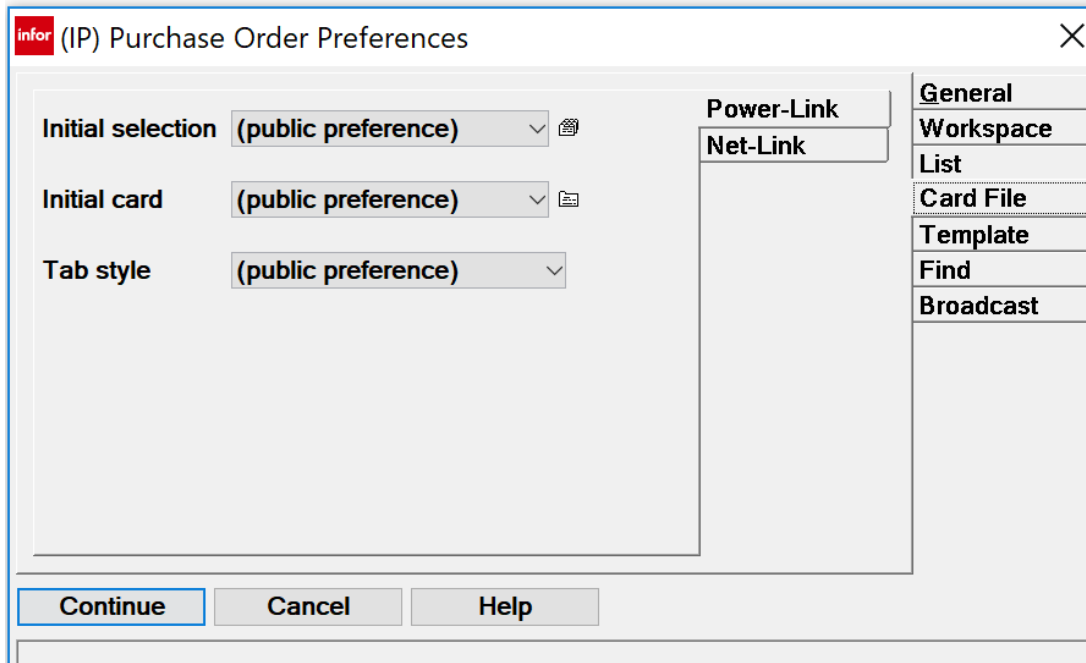
infor (IP) Purchase Order Preferences

| | | |
|--------------------|---------------------|-----------|
| Initial view | (public preference) | General |
| Initial subset | (public preference) | Workspace |
| Initial sort | (public preference) | List |
| Open action | (public preference) | Card File |
| <Alt> open action | (public preference) | Template |
| <Ctrl> open action | (public preference) | Find |
| | | Broadcast |

Continue Cancel Help

- List options determine the view, subset and sort to use when you open the object
- Open Actions are used when you double click on a record in the list
 - 3 options for open
 - Double click only
 - Hold the 'Alt' key while double clicking on the record
 - Hold the 'Ctrl' key while double clicking

Object Preferences – Card File



- Initial Selection
 - Sets the default card file to be used when opening/double clicking on a record in the list
- Initial Card
 - Determines which card should be the active card when the card file opens
- Tab Style
 - Sets the position of the tabs in the card file

Object Preferences - Template

infor (IP) Purchase Order Preferences

Create template
(public preference)

Copy template
(public preference)

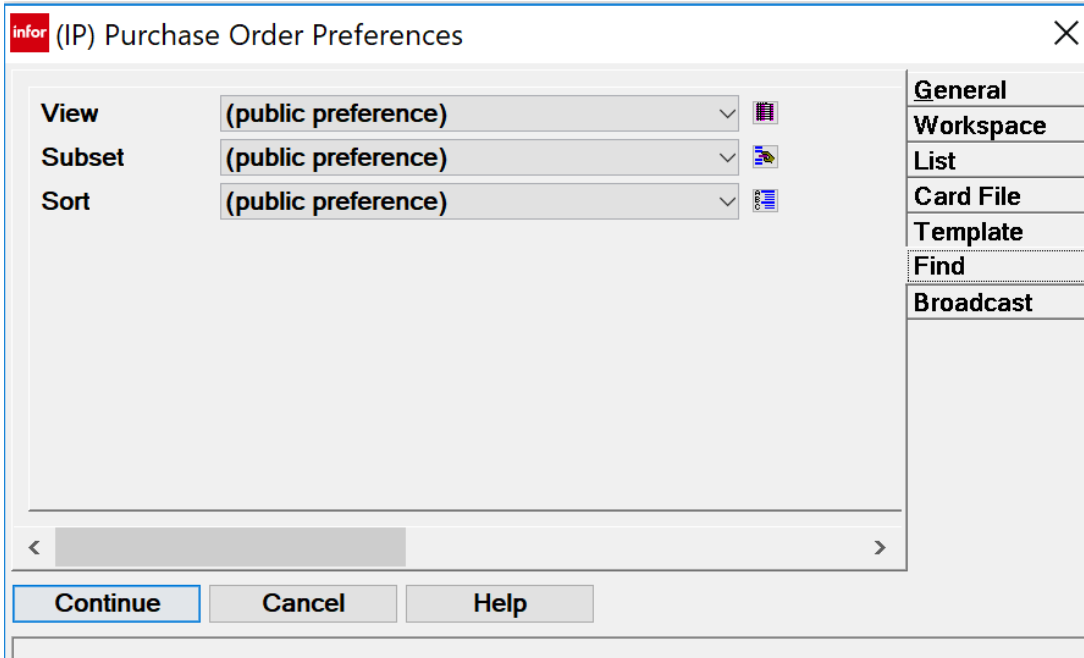
Change template
(public preference)


General
Workspace
List
Card File
Template
Find
Broadcast

Continue Cancel Help

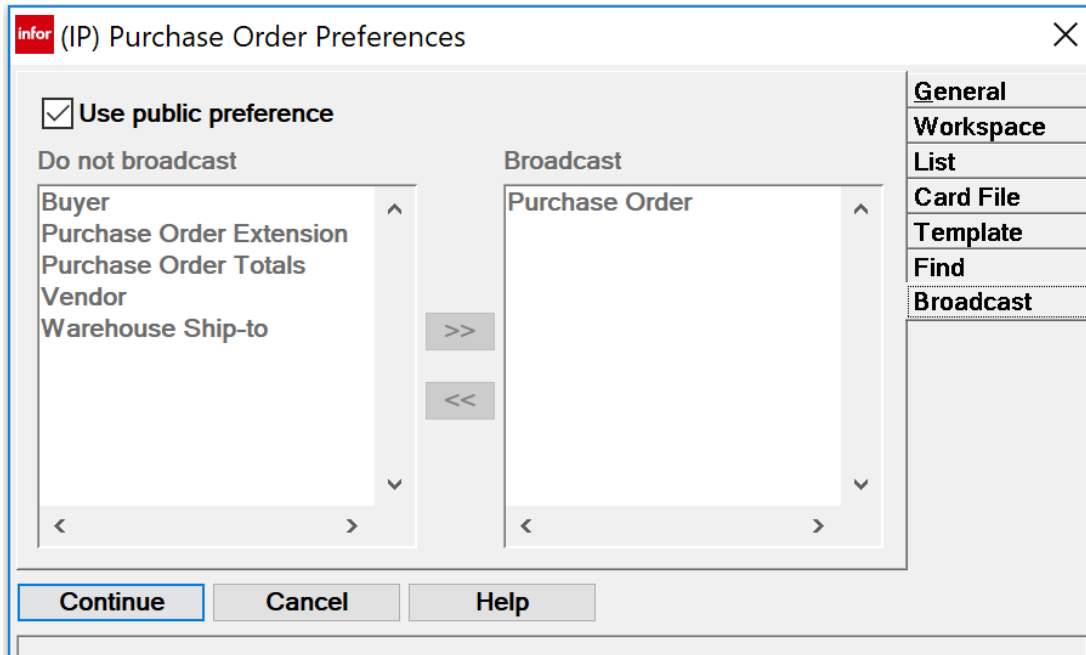
- Sets the default template for each action:
 - Create
 - Copy
 - Change

Object Preferences – Search Find



- When using the ‘Search’ button 
 - Sets the View, Subset and Sort for the records that are displayed

Object Preferences - Broadcast



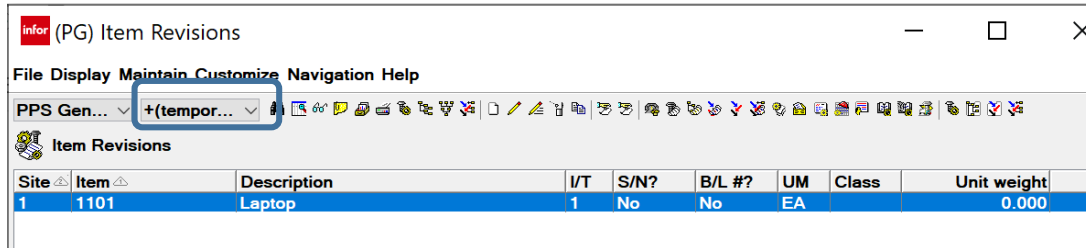
- Broadcast/receive is used when defining a 'Work Bench'
- Preference setting defines the files that will be used to broadcast
- NOTE: if you set up a broadcast/receive option between 2 lists and, when clicking on a second record, the 'Receive' display isn't updating, check your preferences
 - Uncheck the 'Use Public Preference' option
 - Select all the files in the 'Do Not Broadcast' box
 - Add them to the 'Broadcast' list

Shortcut Keys

Shortcut keys

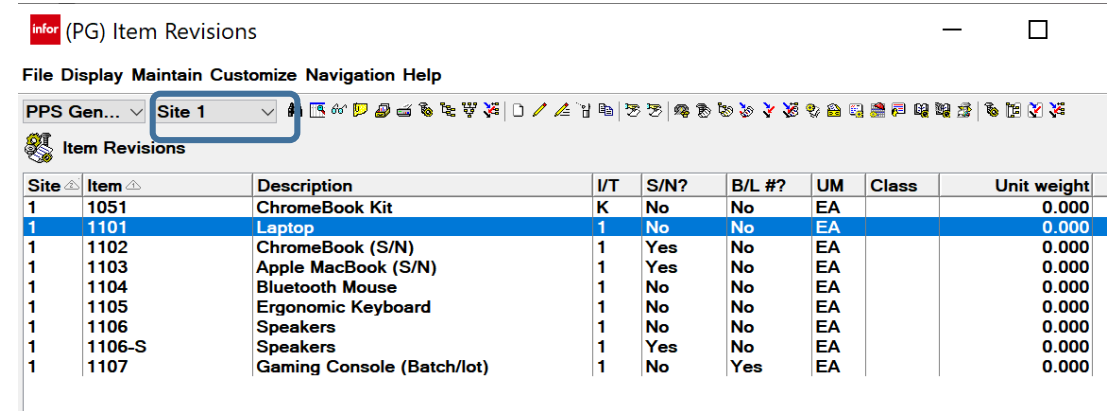
- Control (CTRL) + Z: *Undo*
 - Useful when using prompted or temporary subsets; goes back to the previous subset
- Control + C: *Copy*
 - Copies a value to a field even if it's copied from another file (i.e. Excel) or a field on an attribute card
- Control + V: *Paste*
 - Inserts the copied value into a field
- Control + Y: *Re-display prompt*
 - If using a subset (either temporary or saved) with a 'Prompt' field, will re-display the pop-up to allow for a different value
- Control + L or Control + F: *Locate/Find*
 - Jump to a value in a list
 - Only the fields that are used in the Sort will be displayed when using the Locate/Find shortcut

Control (CTRL) + Z: *Undo*



The screenshot shows the 'Infor (PG) Item Revisions' window. The 'PPS Gen...' dropdown menu is open, and a '+ (tempor...)' option is selected, highlighted with a blue box. Below the menu, the 'Item Revisions' table is displayed with the following data:

| Site | Item | Description | I/T | S/N? | B/L #? | UM | Class | Unit weight |
|------|------|-------------|-----|------|--------|----|-------|-------------|
| 1 | 1101 | Laptop | 1 | No | No | EA | | 0.000 |



The screenshot shows the 'Infor (PG) Item Revisions' window. The 'PPS Gen...' dropdown menu is open, and 'Site 1' is selected, highlighted with a blue box. Below the menu, the 'Item Revisions' table is displayed with the following data:

| Site | Item | Description | I/T | S/N? | B/L #? | UM | Class | Unit weight |
|------|--------|----------------------------|-----|------|--------|----|-------|-------------|
| 1 | 1051 | ChromeBook Kit | K | No | No | EA | | 0.000 |
| 1 | 1101 | Laptop | 1 | No | No | EA | | 0.000 |
| 1 | 1102 | ChromeBook (S/N) | 1 | Yes | No | EA | | 0.000 |
| 1 | 1103 | Apple MacBook (S/N) | 1 | Yes | No | EA | | 0.000 |
| 1 | 1104 | Bluetooth Mouse | 1 | No | No | EA | | 0.000 |
| 1 | 1105 | Ergonomic Keyboard | 1 | No | No | EA | | 0.000 |
| 1 | 1106 | Speakers | 1 | No | No | EA | | 0.000 |
| 1 | 1106-S | Speakers | 1 | Yes | No | EA | | 0.000 |
| 1 | 1107 | Gaming Console (Batch/lot) | 1 | No | Yes | EA | | 0.000 |

- Right Click on 'Item' then 'Customize' and 'Subset Criteria' creates a 'Temporary Subset'
- Control + Z will take you back to the previous subset that was being used

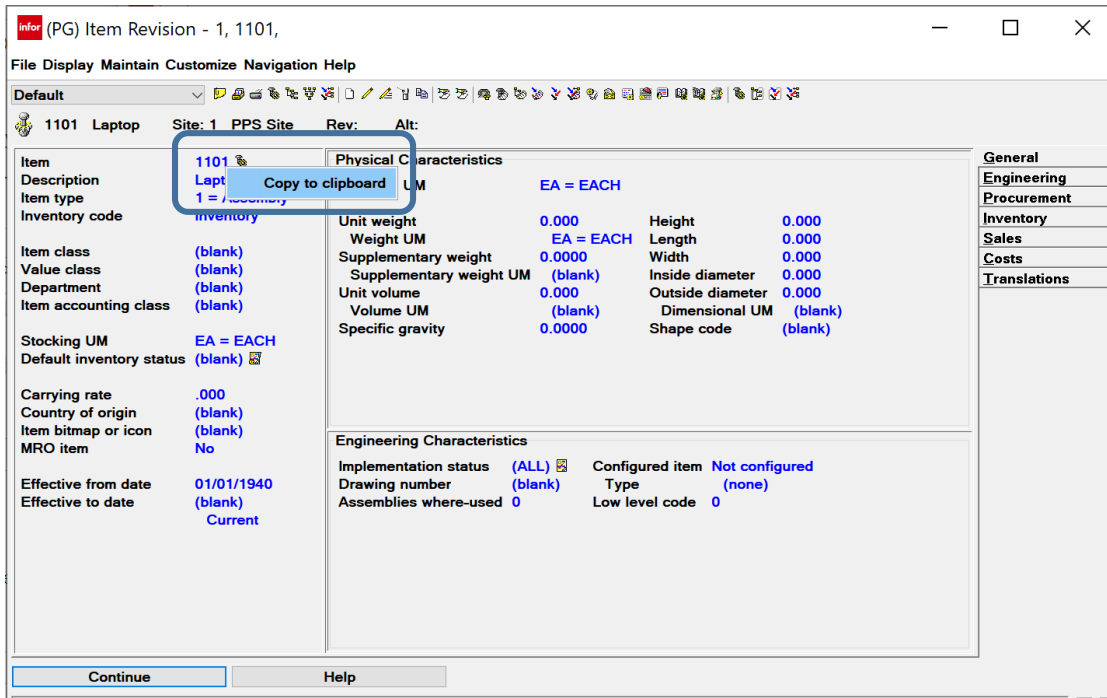
Control + C: *Copy*

- Highlight a value in a field then press Control + C to copy that value
- In the example below, the description of the item is being copied

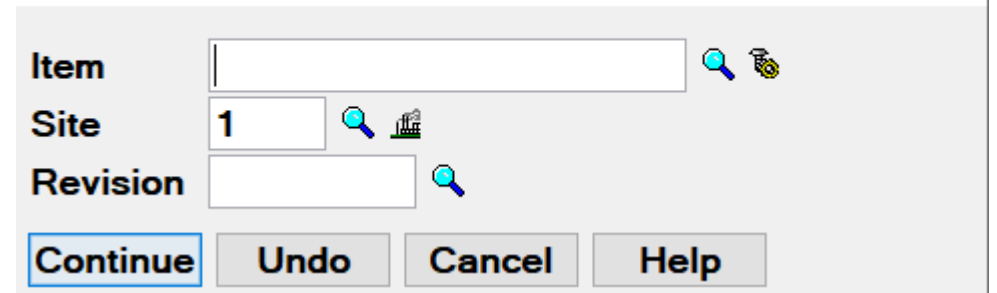
The screenshot shows the 'Change Item Revision' window for item 1101, 'Laptop'. The 'Description' field contains the text 'Laptop', which is highlighted with a blue selection box. The window is titled 'infor (PG) Change Item Revision - 1, 1101,' and includes a menu bar with 'File Display Maintain Customize Navigation Help'. The main area is divided into several sections: 'Item' (Description, Item type, Inventory code, Item class, Value class, Department, Item accounting class, Stocking UM, Default inventory status, Carrying rate, Country of origin, Item bitmap or icon, MRO item, Effective from date, Effective to date), 'Physical Characteristics' (Stocking UM, Unit weight, Weight UM, Supplementary weight, Supplementary weight UM, Unit volume, Volume UM, Specific gravity), 'Engineering Characteristics' (Implementation status, Drawing number, Assemblies where-used), and a 'General' sidebar with tabs for Engineering, Procurement, Inventory, Sales, Costs, and Translations. At the bottom, there are 'Update', 'Cancel', and 'Help' buttons.

Control + V: Paste

- When using Attribute Cards, right clicking on a value (Item Number in the print screen below) will display an option to copy to clipboard
- Then, using the Locate button , use Control + V to paste in the number



(PG) Locate Item Revision



Control + Y: *Re-display prompt*

- If you're using a Subset that has a 'Prompt for Value' field in it, Control + Y will re-display the Prompt window without having to re-select the subset


The screenshot shows the Infor (PG) Purchase Orders application. The main window displays a list of purchase orders with columns for Attachment, Order, Print code, Vendor, and Vendor Name. A modal dialog box titled "(PG) Purchase Order: PO #" is open, featuring a search field labeled "Order (Contains)", a search icon, and buttons for "Continue", "Cancel", and "Help".

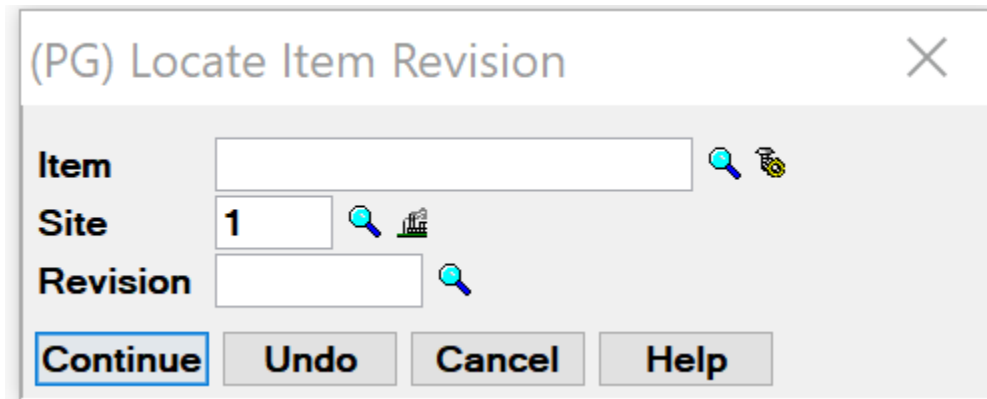
| Attachment | Order | Print code | Vendor | Vendor Name |
|------------|---------|------------|--------|--------------------------------|
| 0.000 | P923133 | | 102380 | COMMERCIAL MACHINE & FAB. |
| 0.000 | P922940 | | 102770 | LOWES |
| 0.000 | P922939 | | 164230 | SW Services, Inc. |
| 0.000 | P922938 | | 161730 | Unity Hydraulics Inc |
| 0.000 | P922937 | | 104840 | JOHNSTONE SUPPLY |
| 0.000 | P922936 | P | 100400 | APPLIED INDUSTRIAL TECHNOLOGIE |
| 0.000 | P922935 | P | 161870 | Bodycote - Morristown |
| 0.000 | P922934 | P | 104840 | JOHNSTONE SUPPLY |
| 0.000 | P922932 | P | 102770 | LOWES |
| 0.000 | P922931 | P | 141070 | CARD SPECIALISTS CO INC |
| 0.000 | P922930 | P | | |
| 0.000 | P922929 | P | | |
| 0.000 | P922928 | P | | |
| 0.000 | P922927 | P | | |
| 0.000 | P922925 | | | |
| 0.000 | P922924 | | | |
| 0.000 | P922923 | | 100400 | APPLIED INDUSTRIAL TECHNOLOGIE |
| 0.000 | P922922 | | 102250 | MOTION INDUSTRIES, INC. |
| 0.000 | P922920 | | 100400 | APPLIED INDUSTRIAL TECHNOLOGIE |
| 0.000 | P922918 | | 165600 | Consolidated Steel, Inc. |
| 0.000 | P922917 | | 164350 | Powers Industrial Hardware |
| 0.000 | P922916 | | 111460 | FERGUSON ENTERPRISES, INC |
| 0.000 | P922915 | | 102770 | LOWES |
| 0.000 | P922914 | | 164350 | Powers Industrial Hardware |
| 0.000 | P922912 | | 160900 | Process Supply, Inc. |
| 0.000 | P922911 | | 100400 | APPLIED INDUSTRIAL TECHNOLOGIE |

The screenshot shows the Infor (PG) Purchase Orders application with a single purchase order selected. A modal dialog box titled "(PG) Purchase Order: PO #" is open, featuring a search field labeled "Order (Contains)", a search icon, a checkbox for "Append to active subset: PO #", and buttons for "Continue", "Cancel", and "Help".



| Attachment | Order | Print code | Vendor | Vendor Name |
|------------|---------|------------|--------|-------------|
| 0.000 | P922907 | | 102770 | LOWES |



Control + L or Control + F: *Locate/Find*


- Clicking on the 'Locate' button 
- OR using Control + L (Locate)
- OR using Control + F (Find) will bring up a window asking for criteria to locate/find the record
- NOTE: The sort being used on the list determines the fields displayed in the locate/find prompt



(PG) Locate Item Revision

Item  

Site  

Revision 

Continue Undo Cancel Help

Conclusion

- PowerLink gets it's name from the 'Power' options available throughout the application
- Topics for the next presentation 'The Power of PowerLink Part 2'
 - Cards
 - Card Files
 - Workbenches
 - Workspaces
 - Presentation Schemes
 - Quick change